Care Recipient Health Snapshot

Share the essentials · show what is current · keep the person visible

A concise caregiver handoff snapshot of key health information, current needs, contacts and where to find the fuller record.

Care handoff · current essentials

A quick orientation—not a replacement for the full record.

Update before sharing. Note unknowns and attach the current medication list or care instructions when needed. This snapshot does not establish new treatment directions. [1]

NAME / PREFERRED NAME

DATE OF BIRTH

PREPARED BY / ROLE

UPDATED ON / INFORMATION CONFIRMED WITH

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1 KEY HEALTH INFORMATION

CURRENT CONDITIONS / RECENT IMPORTANT CHANGES

ALLERGIES / REACTIONS (OR UNKNOWN) / CURRENT MEDICATION LIST LOCATION

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2 EVERYDAY CARE AND THE PERSON'S PREFERENCES

COMMUNICATION / LANGUAGE / HEARING

MOBILITY / EQUIPMENT / ASSISTANCE

CURRENT SUPPORT NEEDS / ROUTINES / WHAT MATTERS MOST

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3 CONTACTS AND THE FULLER RECORD

MAIN CAREGIVER / PHONE

CLINICIAN / CLINIC PHONE

BACKUP CONTACT / PHONE

FULL RECORD / CURRENT CARE PLAN LOCATION

Updates · handoff check · records to bring

4 CHECK THE HANDOFF BEFORE SHARING

- [ ] Confirm what the person wants the next caregiver or clinician to know.
- [ ] Attach or locate the current medicines, allergies and relevant care instructions. [1, 2]
- [ ] Keep completed copies private and replace out-of-date versions.

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5 RECORD A CHANGE THAT NEEDS THE SNAPSHOT UPDATED

DATE / WHAT CHANGED	CONFIRMED WITH / UPDATE MADE BY

RECORD OR QUESTION STILL MISSING / WHO WILL CHECK

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Use current professional instructions and original records for care decisions. For a life-threatening emergency, call 911 rather than delaying care to complete or find this snapshot. [3]

Sources informing this resource · Original worksheet prompts by TCC

[1] MedlinePlus — Personal Health Records

[2] National Institute on Aging — How To Prepare for a Doctor's Appointment

[3] MedlinePlus — Emergency Medical Services

Sources checked September 10, 2026. Use the person's individualized care instructions.

Everything about your loved one's care, organized in one place.

The Caregiving Concierge™ helps families organize appointments, providers, medications, documents, schedules, transportation details, and other important care information in one secure workspace.

https://www.thecaregivingconcierge.com/library

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